



LIFEPLAN NEBRASKA

Your Trusted Estate Planning Partner

Estate Planning Goals

Client

PLANNING ISSUE

IMPORTANCE

Least Most

Retaining Control During Lifetime

1 2 3 4 5

Planning for Incapacity

Financial Management

1 2 3 4 5

Health Care Decisions

1 2 3 4 5

Avoiding Death Probate

Cost

1 2 3 4 5

Delay

1 2 3 4 5

Complication

1 2 3 4 5

Publicity

1 2 3 4 5

Spousal Protection

Catastrophic Creditor Protection

1 2 3 4 5

Medicaid Protection

1 2 3 4 5

Investment Assistance

1 2 3 4 5

Remarriage Protection

1 2 3 4 5

Estate Tax Planning

1 2 3 4 5

PLANNING ISSUE

IMPORTANCE

Least . . . Most

Keeping Assets in the Bloodline 1 2 3 4 5

Planning for Minor (Grand)children 1 2 3 4 5

Planning for Beneficiary's "Special Needs" 1 2 3 4 5

Planning for Adult Children

Investment Assistance 1 2 3 4 5

Tax & Administrative Assistance 1 2 3 4 5

Divorce Protection 1 2 3 4 5

Catastrophic Creditor Protection 1 2 3 4 5

Medicaid Protection 1 2 3 4 5

Special Bequests to Individuals

Monetary 1 2 3 4 5

Property (Business, Farm, etc.) 1 2 3 4 5

Personal Effects 1 2 3 4 5

Special Bequests to Charitable Organizations 1 2 3 4 5

Other Special Concerns? (Please Indicate) _____

PLEASE REVIEW AND LIST TOP 3 GOALS IN ORDER OF IMPORTANCE TO YOU

1. _____ 2. _____ 3. _____